



World Organisation
for Animal Health



WOAH Standards Facilitating Safe International Trade Commodity: Poultry Meat

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Mozambique's Broiler industry: Growth, Biossecurity and the case for fair trade

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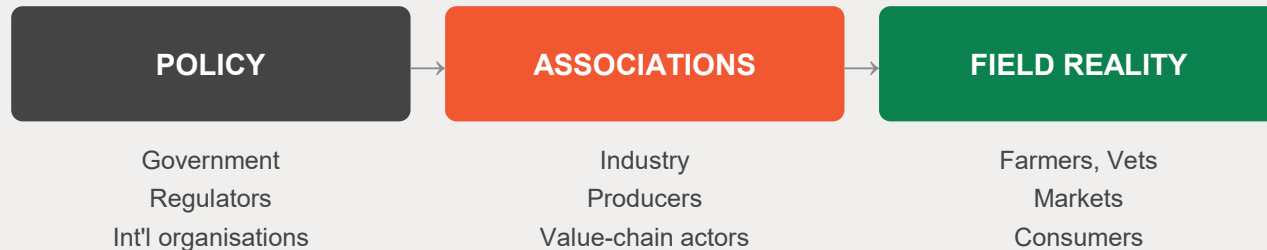
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THE ROLE OF THE PRIVATE SECTOR

Why Associations Must Be at the Table

“Associations represent the reality between policy and the farm.”



AMIA
ASSOCIAÇÃO MOÇAMBICANA
DA INDÚSTRIA AVÍCOLA

- National private-sector association
- Companies across the poultry value chain
- Presence across Mozambique
- Represents the organised industry



SECTOR REPRESENTATION

The National Industry Association



AMIA brings together organised poultry companies operating across Mozambique and across the poultry value chain.

NATIONAL

National scope

ALL SEGMENTS

Broilers | Layers | Inputs | Processing

>90%

of key productive inputs supplied
through AMIA-associated industry

~80%

of frozen chicken supply
to the national market

National coverage

NORTH

CENTRE

SOUTH

Hatcheries → Feed → Farms → Processing → Market

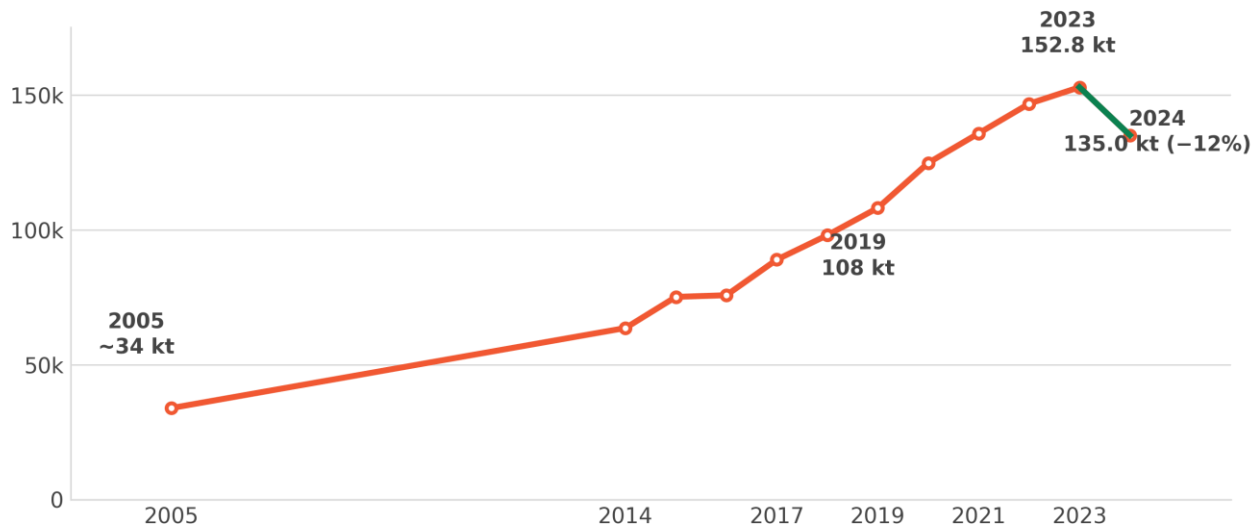


NATIONAL CHICKEN MEAT PRODUCTION | MOZAMBIQUE

A Fourfold Transformation

~4.5×

increase since 2005



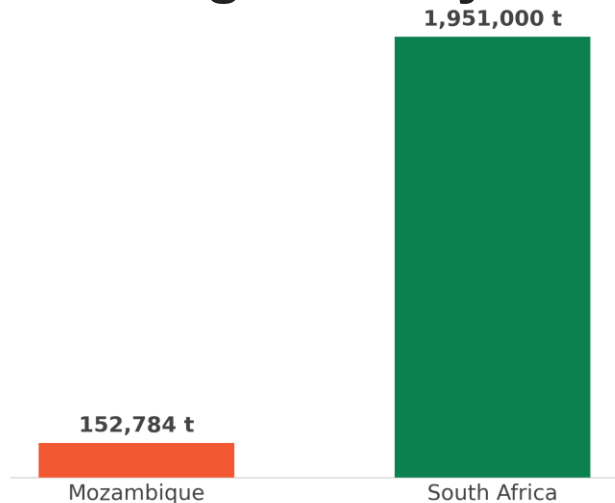
Growth has been significant — but it has not been linear.

Source: MADER, Boletim de Estatísticas Pecuárias 2014–2024; 2005 benchmark: AMIA Poultry Sector Profile.



REGIONAL COMPARISON

A Growing Industry - At a Different Scale



~13x

South Africa's production scale

The competitiveness gap is not necessarily a capability gap. It is also a scale and development-stage gap.

Scale → Cost → Infrastructure → Technology → Market Power



INSIDE MOZAMBIQUE

One Industry. Different Realities.

SMALL-SCALE



INDUSTRIAL

Manual

Automated

Limited biosecurity

Structured biosecurity

Live-bird markets

Formal retail

Limited cold chain

Processing + cold chain

~29,500

small producers

>95%

of production units

~64%

of national production

“This is not one production system.”



THE REALITY

The Small Producer Is Not the Problem

The system around the producer determines what is possible.



Access to
inputs

Veterinary
services

Biosecurity
knowledge

Slaughter
infrastructure

Market
access

Women & Rural Livelihoods

- Poultry is an important source of income
- Strong presence in peri-urban and rural areas
- Women play an important role in small-scale poultry and local markets

Many small producers operate with limited access to the infrastructure, services and systems that make good biosecurity possible.



BIOSECURITY

Biosecurity Is a System — Not Just a Farm Practice



- Informal movement
- Live-bird markets
- Limited inspection
- Limited cold chain
- Weak traceability

“Where does biosecurity begin — and where does it end?”

45,000+ birds destroyed during the 2023 HPAI response



THE BRIDGE BETWEEN HEALTH AND TRADE

Mozambique: A Naturally Open Market

Our geography creates opportunity — and exposure.

MARITIME ACCESS

Global markets

BR Brazil
US United States



MAPUTO · BEIRA · NACALA

LAND ACCESS

Regional markets

ZA South Africa
SZ Eswatini



SOUTHERN MOZAMBIQUE BORDERS

~2,500 km

Coastline

3

Major commercial ports
Maputo | Beira | Nacala

2 channels

of exposure
Maritime + Land

2023 — frozen whole chickens (exporter-reported): Brazil → Mozambique ~508 t · South Africa → Mozambique ~3.25 kt · South Africa → Mozambique (all chicken meat) ~10,370 t

Trade statistics may differ between exporter and importer declarations. Sources: UN Comtrade/WITS 2023; USDA FAS.



TRADE INTEGRITY

The Greatest Vulnerability Is Not Legitimate Trade. It Is Uncontrolled Trade.

Uncontrolled cross-border flows can undermine both market competitiveness and animal-health controls.

FORMAL TRADE

Supplier → Port/Border → Customs → Vet control → Market

INFORMAL / UNCONTROLLED FLOWS

Supplier → Border → ? → Market

The problem is not movement itself. The problem is movement outside the control system.

LEGAL

necessary

FAIR

desirable

SAFE

obligatory

UNCONTROLLED

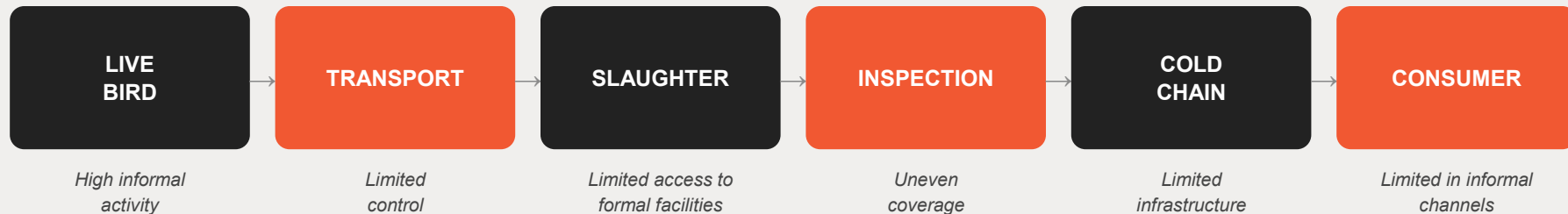
the real systemic risk

“When borders are open to trade, they must also be strong enough to protect the integrity of that trade.”



THE VALUE CHAIN

From Live-Bird Markets to Safe Food



If we want better biosecurity, we must invest in the system that surrounds the farmer.



COMPETITIVENESS

Whole Birds Can Be Competitive. Portions Can Tell a Different Story.

DOMESTIC PRODUCTION

increasingly competitive
in whole birds

IMPORTED PORTIONS

strong price
competition



“Self-sufficiency in whole birds $\neq$ self-sufficiency in portions.”

135,025 t

Domestic production

153,411 t

Estimated national demand

18,386 t

Estimated gap

~88%

Domestic coverage

Lower-value frozen cuts remain structurally important in imports — more affordable for price-sensitive consumers.

This is not only a trade question. It is also a purchasing-power question.



DEVELOPMENT STAGE

The Cost of Production Reflects the Development Stage

MOZAMBIQUE

LARGE-SCALE GLOBAL PRODUCERS

Scale

Feed

Infrastructure

Logistics

Processing

Finance

Technology

60–70%

of production costs is feed
in commercial/semi-commercial systems

20–35%

higher compound feed prices vs.
South Africa in tight commodity periods

***A developing industry cannot build competitiveness overnight.
Competitiveness also reflects the level of development of the economy around the industry.***



SUSTAINABLE COMPETITIVENESS

Safe Trade Must Also Be Fair Trade

“Fair does not mean protection from competition.”

“Fair means recognising different starting points, different production systems and different development realities.”

S

SAFE

Trade must protect animal health, public health and food safety.

F

FAIR

Trade should recognise legitimate differences in development stage, scale and production conditions.

P

PROGRESSIVE

Standards should help countries progressively build the capacity to comply.

SUSTAINABLE COMPETITIVENESS



BUILDING THE PATH FORWARD

From Compliance to Capacity

1

BIOSECURITY

Risk-based, practical and adapted to different production systems.

2

INFRASTRUCTURE

Slaughter, inspection, laboratories, cold chain and logistics.

3

PRODUCER CAPACITY

Training, veterinary support, finance and access to quality inputs.

4

PUBLIC-PRIVATE COORDINATION

Government + Veterinary Services
+ Associations + Industry +
Producers + Partners.

“The question is not only: How do we make producers comply?”

How do we enable producers to comply?



Thank you. AMIA — Mozambique.

Let's Build Safer Markets Together.

- Stronger biosecurity.
- Stronger producers.
- Stronger veterinary systems.
- Fairer and more resilient markets.

"No market is truly safe if the system around it is too weak to sustain compliance."



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